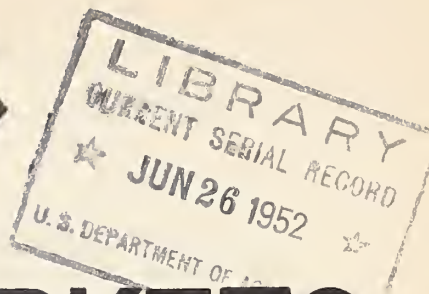


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Foreign CROPS AND MARKETS



VOLUME 64

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ALMONDS (Page 566)

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FOR RELEASE

MONDAY

JUNE 23, 1952

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L A T E N E W S

Cotton acreage in Turkey this year is expected to be about the same as in 1951, according to preliminary private reports. Pink bollworm infestation is spreading and could result in yields lower than those of a year ago unless the intensive seed fumigation and other measures now being carried on by the Government are successful.

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Transshipments of Mexican cotton through United States ports in March 1952 amounted to 54,000 bales (of 500 pounds gross). This makes a total of 553,000 bales for August-March compared with 801,000 for a similar period a year ago. All figures include linters and waste but exclude shipments by railroad across the United States to Canada. Shipments by railroad to Canada for this year have reached about 11,000 bales. The principal destinations in 1951-52 have been France, 195,000 bales, United Kingdom 106,000, Japan 84,000, Italy 41,000, Belgium 28,000, Spain 20,000, Sweden 19,000, Switzerland 12,000 and the Netherlands, 10,000.

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FOREIGN CROPS AND MARKETS

Published weekly to inform producers, processors, distributors and consumers of farm products of current developments abroad in the crop and livestock industries, foreign trends in prices and consumption of farm products, and world agricultural trade. Circulation of this periodical is free to persons in the U. S. needing the information it contains in farming, business and professional operations. Issued by the Office of Foreign Agricultural Relations of the U. S. Department of Agriculture, Washington 25, D.C.

MEDITERRANEAN BASIN ALMOND FORECAST THIRD LARGEST ON RECORD 1/

The 1952 preliminary forecast of shelled almond production in the leading foreign producing countries is 89,300 short tons compared with 66,300 tons (revised) in 1951 and 98,700 tons in 1950. The forecast exceeds the 10-year (1941-50) average of 68,100 tons by 31 percent and the 5-year (1946-50) average of 72,700 tons by 23 percent. The present indications are for the third largest production on record, exceeded only by the 98,700 tons in 1950 and 89,700 tons in 1945.

The large Italian crop is primarily responsible for this year's large forecast. The Spanish, Portuguese and French crops show increases over last year while French Morocco and Iran are off slightly. The Spanish crop is estimated at 27,000 at this time but probably will be revised by September. Growing conditions in Spain have been spotty, making impossible a close forecast at this time. The United States official almond estimate will not be available until July 1; however, on June 1 the condition figure was 57 percent compared with 68 percent last year at the same date. This indicates that a somewhat smaller harvest is expected than 42,700 tons of 1951.

Growing conditions in the foreign countries generally were good, although nearly all of them reported some frost damage at pollination. In Italy, the largest producer, some damage is reported on the Island of Sicily and a bit in parts of Apulia; however, the harvest will still be nearly twice that of the previous year. In Spain some areas report very fine crops with little or no damage, others report minor damage, etc. The ideas of the size of the Spanish crop seem to run all the way from below average to somewhat over last year with the more reliable information pointing to one not much larger than last year. The 1952 Mediterranean Basin harvest will follow the small one of 1951 and could be expected to be larger. In the United States early in the season it was thought a crop as large as last year at least was to be expected; however, this did not turn out to be the case when the first reports were prepared.

The remaining stocks of 1951 harvest almonds in the Mediterranean Basin were estimated on June 1, to total about 12,100 short tons compared with 15,400 tons on the same date last year. The present stock figure represents about 18 percent of the 1951 harvest compared with 16 percent on the same date last year. This season Spain is estimated to have 8,000 tons or nearly two-thirds of the total compared with 5,400 tons last year at this time. The estimate of Spanish stocks at this time is also one in which one hears both higher and lower figures and for the same reasons. Italy has an estimated 3,500 tons or 5 percent of the 1951 harvest compared with 7,000 tons a year earlier. Portugal has 500 tons of the remaining foreign stocks. France and Iran are for all practical purposes sold out and it is reported less than 100 tons remain in French Morocco.

1/ A more extensive statement soon will be published as a Foreign Agriculture Circular available from the Office of Foreign Agricultural Relations, United States Department of Agriculture, Washington 25, D. C.

ALMONDS, SHELLLED: Estimated commercial production in specified countries, 1952 with comparisons

(Rounded to nearest 100 short tons)

Year	France	French Morocco	Iran	Italy	Portugal	Spain	Foreign total	United States unshelled
	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>
Average:								
1941-50	800	2,300	6,400	31,800	2,500	24,300	68,100	28,100
1946-50	900	2,900	7,100	35,400	3,400	23,000	72,700	36,200
Annual:								
1946	700	2,400	7,700	33,000	3,700	24,200	71,700	37,800
1947	1,000	1,200	6,000	46,200	1,100	22,000	77,500	29,200
1948	1,100	3,300	7,000	18,700	2,900	21,000	54,000	34,000
1949	300	3,300	7,700	24,300	4,200	21,900	61,700	43,300
1950	1,600	3,900	7,100	55,000	5,300	25,800	98,700	37,700
1951 1/	600	3,500	7,700	25,300	2/ 3,100	2/ 26,100	2/ 66,300	42,700
1952 1/	800	2,800	6,900	47,800	4,000	27,000	89,300	3/

1/ Preliminary.

2/ Revised.

3/ Official quantitative estimate for California not yet available. Condition figure on June 1 was 57 percent compared with 68 percent on June 1, 1951 which indicates a smaller crop for 1952. First official tonnage estimate is due on July 1.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, results of office research, trade and other information.

UNITED STATES: Imports for consumption of shelled and unshelled almonds

(Crop year, September-August)

Year	French: Morocco:	Italy	Portugal	Spain	Other countries:	Total
	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>
SHELLED						
Averages:						
1941-42/1950-51	25	1,772	469	2,660	145	5,071
1946-47/1950-51	36	3,241	109	887	35	4,308
Annual:						
1946-47	34	2,054	187	950	76	3,301
1947-48	27	4,179	98	1,805	26	6,135
1948-49	0	4,370	206	255	47	4,878
1949-50	41	695	10	1	2/	747
1950-51	78	4,908	43	1,423	25	6,477
1951-52 1/	35	460	2/	539	64	1,098
UNSHELLED						
Averages:						
1941-42/1950-51	0	2	3	114	1	120
1946-47/1950-51	0	5	0	56	1	62
Annual:						
1946-47	0	6	0	145	6	157
1947-48	0	9	0	0	2/	9
1948-49	0	2	0	0	1	3
1949-50	0	2/	0	0	2/	2/
1950-51	0	6	0	135	0	141
1951-52 1/	0	2/	0	0	0	2/
1/ 8 months - September through April. 2/ Less than one-half ton.						

UNITED STATES: Exports for consumption of shelled and unshelled almonds

	Canada:	Mexico:	Central America:	South America:	Others :	Total
	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>
SHELLED						
1952 1/	108	2/	6	17	153	284
UNSHELLED						
1952 1/	0	0	2/	2/	12	12
1/ 4 months - January through April 2/ Less than one-half ton.						

Compiled from official records of the Bureau of the Census.

The 1951-52 export season in the Mediterranean Basin now rapidly approaching a close is estimated to have moved about 55,200 short tons of shelled almonds into international trade so far this season. The total estimated available supply at the start of the season was 81,700 short tons (66,300 harvest, 15,400 tons carry-over). The estimated international trade represents 83 percent of the 1951 harvest and 68 percent of the total supply available at the start of the season. On the basis of available information, Italy was again the principal exporter with about 17,000 tons or 31 percent of the total followed by Spain, Iran, Portugal and French Morocco in that order. In Spain official records indicate 10,213 short tons were exported during the first 6 months of the season with export licenses for another 6,600 tons issued. If the 6,600 tons are actually exported Spain will run Italy a close second.

Although exporters in some countries complained through most of the season about the poor market the statistics seem to indicate that the year was not as bad as might be supposed. It was not a phenomenal year like 1950-51 when an all-time high was exported. The season was characterized by high prices during the first 6 months and a slowing up of buying by the United Kingdom, the United States and some of the other principal markets. As the season draws to a close all countries having stocks except Spain believe they will be about sold out of old-crop before new-crop nuts go to market. The Spanish situation is difficult because of the inflexibility of export prices and other factors. It appears now that Spain, while being able to move some nuts before new-crop, will still enter the new year with a good-size carry-over.

The early indications for the 1952-53 season are for a hard fight among the Mediterranean producers for whatever market exist. The British are not expected to purchase nearly the tonnage normally sold to that country due to the present austerity program. France and Germany are showing signs of reducing purchases although if prices become attractive enough may come into the market for something near normal quantities. Other markets mostly minor ones may be more or less normal. The United States is not expected to take the large tonnage of the 1950-51 season although it could exceed the relatively small tonnage imported in 1951-52. The United States import quota for the 1951-52 season was not reached. The possibility of another import quota in this country during 1952-53 must be considered as well as the ample stocks of both old and new-crop nuts which will be available this fall to meet domestic requirements.

The Italian exporters ever alert to the state of markets abroad and mindful of the large Mediterranean supply for the coming year are already quoting September-October shipments at substantially lower figures than for prompt shipment old-crop. This same thing was done in 1950-51 with disastrous results to some exporters. On the basis of one quotation a certain grade of shelled could be landed in New York at 54 cents not including importer's profit and the 10 cents per pound fee. It must be remembered that Spanish export prices have not yet been announced for the new export year. It is possible that the Spanish will come out with competitive quotations. Altogether the coming season at this date appears to be one in which selling pressure will be strong and real merchandising on the part of sellers will have to be shown.--By W. R. Schreiber.

COMMODITY DEVELOPMENTS

SEED

NEW ZEALAND SEED SITUATION

Relatively large exportable surpluses of perennial ryegrass and white clover seed are indicated to be available from the 1951-52 season's production and carry-over stock in New Zealand. The carry-over of white clover is estimated at around 900,000 pounds. Some orchard grass, timothy and browntop seed was also carried over from the previous year's output. It is likely that normal exportable supplies of Italian and short rotation ryegrass, broad red and Montgomery red clover seeds will be available this season. Supplies of chewings fescue and browntop seeds may be below average and the export of orchard grass is currently prohibited but because of increasing supplies may be placed back on the export availability later in the year.

Recently the seed market was relatively inactive and prices have declined to levels much below those of recent years. A dry fall reduced the demand for seed for sowing in New Zealand and increased competition from other sources has reduced the demand in the export market.

While no concrete production estimates are yet available for the 1951-52 season, some indications are given below with comparisons.

Kind of Seed	Production			Indicated 1951-52
	1948-49	1949-50	1950-51	
	1,000	1,000	1,000	
	pounds	pounds	pounds	
Perennial ryegrass	17,159	17,550	36,384	slightly smaller
Italian ryegrass	1,819	1,352	4,585	slightly smaller
Short rotation ryegrass	3,015	3,326	5,989	larger
Orchard grass	1,193	770	1,612	larger
Chewings fescue	5,265	3,523	2,371	considerably smaller
Crested dogstail	1,770	1,093	1,472	one-half last year
Broad red clover	3,570	2,379	1,916	slightly smaller
Montgomery red clover)	1,053	913	no comment
Timothy	-	251	376	no comment
Alfalfa	-	183	379	smaller
White clover	3,545	4,294	7,087	record crop

COTTON AND OTHER FIBERCOTTON-PRICE QUOTATIONS
ON WORLD MARKETS

The following table shows certain cotton-price quotations on world markets converted at current rates of exchange.

COTTON: Spot prices in certain foreign markets, U.S. gulf-port average, and taxes incident to exports

Market location, kind, and quality	Date 1952	Unit of weight	Unit of currency	Price in foreign currency	Equiv. US¢ a lb. Spot : Export & quo- : inter- tation : mediate : taxes
Alexandria		:Kantar			
Ashmouni, FG.....	6-19	: 99.05 lbs.	:Tallari	: 82.00	: 47.20 : -----
Ashmouni, Good.....	"	: "	: "	: 69.50	: 40.01 : -----
Ashmouni, FGF.....	"	: "	: "	: 62.50	: 35.98 : -----
Karnak, FG.....	"	: "	: "	: 140.00	: 80.59 : -----
Karnak, Good.....	"	: "	: "	: 107.00	: 61.59 : -----
Karnak, FGF.....	"	: "	: "	: (not quoted)	: : -----
Bombay		:Candy			
Jarila, Fine.....	"	: 784 lbs.	:Rupee	:1/ 680.00	: 18.11 : 10.65
Broach Vijay, Fine.....	"	: "	: "	:2/ 800.00	: 21.31 : 10.65
Karachi		:Maund			
4F Punjab, SG, Fine....	6-18	: 82.28 lbs.	: "	:3/ 88.00	: 32.27 : 13.85
239F Sind, SG, Fine....	"	: "	: "	:3/ 93.00	: 34.10 : 13.85
239F Punjab, SG, Fine..	"	: "	: "	:3/ 96.00	: 35.20 : 13.85
Izmir		:Killogram			
Acala I.....	6-19	: 2.2046 lbs.	:Kurus	: 270.00	: 43.74 : -----
Acala II.....	"	: "	: "	: 250.00	: 40.50 : -----
Adana					
Acala I.....	"	: "	: "	: 240.00	: 38.88 : -----
Lima		:Sp. quintal			
Tanguis, Type 3-1/2....	6-17	: 101.4 lbs.	:Sol	: 495.00	: 31.27 : 7.57
Tanguis, Type 5.....	"	: "	: "	: 467.00	: 29.50 : 5.76
Pima, Type 1.....	"	: "	: "	: (not quoted)	: : -----
Recife		:Arroba			
Mita, Type 4.....	6-19	: 33.07 lbs.	:Cruzeiro	:3/ 310.00	: 51.00 : 2.4% ad
Sertao, Type 4.....	"	: "	: "	:4/ 355.00	: 58.41 : valorem
Sao Paulo					
Sao Paulo, Type 5.....	"	: "	: "	: 295.00	: 48.53 : 3.0% ad
Torreón		:Sp. quintal			: valorem
Middling, 15/16".....	"	: 101.4 lbs.	:Peso	: 232.00	: 26.45 : 5.47
Houston-Galveston-New					
Orleans av.Mid. 15/16"	"	:Pound	:Cent	:XXXX	: 40.75 : -----

Quotations of foreign markets and taxes reported by cable from U.S. Foreign Service posts abroad. U.S. quotations from designated spot markets.

1/ Reported 680.00 to 700.00 (18.65). Ceiling 820.00 (21.84).

2/ Reported 800.00 to 815.00 (21.71). Ceiling 925.00 (24.64).

3/ Nominal.

4/ Seller.

INDIAN COTTON IMPORTS

UP; EXPORTS LAG

Imports of cotton into India during August 1951 through March 1952, the first 8 months of the current season, totaled 635,000 bales (of 500 pounds gross), 33 percent above the 476,000 bales imported during the corresponding period of 1950-51, according to Giles A. Hubert and V. Krishnamurthy of the American Consulate General, Bombay. Of the total thus far in the current season, 442,000 bales originated in the United States, compared with the 178,000 bales imported from this country in the same months of 1950-51. Egypt, Kenya, and the Anglo-Egyptian Sudan were the next most important sources with 47,000, 42,000, and 38,000 bales, respectively, imported from these countries in the first 8 months of 1951-52. Imports during the 1951-52 season are expected to total about 1 million bales, roughly 70 percent of which will originate in the United States. In 1950-51, imports totaled 807,000 bales, with 298,000 bales from the United States.

Exports of cotton from India, on the other hand, are lagging far behind the preceding season, only 1,600 bales having been shipped from the country during the first 7 months of 1951-52 compared with almost 24,000 bales exported in the same months of 1950-51. Of this small total 560 bales went to the United Kingdom, 440 to Italy, and 230 to France. Only 24 bales were shipped to the United States, a fraction of the 6,600 bales exported to this country in the first 7 months of 1950-51. Exports to all destinations in 1950-51 totaled 153,000 bales.

Since the announcement of the original export quota of about 100,000 bales on February 21, 1952, for the 1951-52 crop year, the Government of India has periodically increased the quota to the present total of 246,000 bales, including 123,000 bales of Bengals, 12,000 bales of Dholleras, 10,000 of Assam-Comillas and a remainder consisting of miscellaneous short-stapled growths. This compares with the 1950-51 export quota of 153,000 bales, made up of 149,000 bales of Bengals and 4,000 bales of Comillas.

One of the primary factors responsible for the continuous additions to the export quota in recent months has been the increase in the estimates of the 1951-52 cotton crop from 2.8 million bales earlier in the season to about 3 million bales at present. This is substantially above the crop of 2,695,000 bales produced in 1950-51.

This increased production, combined with larger imports resulted in a heavy supply of cotton now on hand in India. Although mill consumption of 1,881,000 bales during the first 7 months of 1951-52 was considerably above the 1,619,000 bales consumed in that period of 1950-51, prices of cotton on the domestic market declined continuously during March and April. During May, however, prices tended to stabilize at 15 to 30 percent below the government ceiling prices but substantially above the floor prices. In the middle of May the government assured the trade of its intention to purchase cotton at the floor prices and appointed 18 firms to act as buying agents. Some members of the trade, however, feel that prices will not reach the floor level, since domestic and foreign cotton textile sales picked up somewhat in the latter part of May. Thus the government may not be obligated to purchase large quantities of cotton at the floor prices.

1951-52 PAKISTANI COTTON
CROP REVISED UPWARD

Recent unofficial estimates of the 1951-52 cotton crop in Pakistan have placed production at 1,285,000 bales (of 500 pounds gross), somewhat above earlier estimates of a crop equal to the 1950-51 production of 1,227,000 bales, according to Henry W. Spielman, Agricultural Attache, American Embassy, Karachi. This latest estimate has been fairly well substantiated by the fact that 1,180,000 bales have arrived in Karachi from the up-country producing regions, consumption in the producing areas amounts to about 65,000 bales and 40,000 additional bales in the interior are awaiting shipment to the Karachi market. Some cotton gins in the Punjab were reported to be still operating full time in the latter part of May. The Punjab crop, due to higher yields than earlier expected, accounted for the upward revision in the total estimate of the Pakistan crop.

Exports of cotton from Pakistan during the 8-month period, August 1951 through March 1952, amounted to 635,000 bales, considerably less than the 876,000 bales exported during the corresponding period of the 1950-51 season. Japan has been the most important destination of Pakistan cotton in 1951-52, with 205,000 bales shipped to that country in the first 8 months. Exports to China during the period August-March 1951-52 totaled 93,000 bales, with estimated shipments in April and May boosting this total to 250,000 bales. About 15,000 bales are reportedly awaiting shipment to China before the end of the current season. Of the European countries, 65,000 bales were shipped to the United Kingdom in the first 8 months of 1951-52, about 56,000 bales to Italy, and substantial but lesser quantities to France and Poland.

The decline in exports during the current season, combined with the slight increase in production has resulted in the accumulation of a large quantity of unsold cotton stocks in Pakistan. At the end of May it was estimated that about 475,000 bales remained unsold in the country, not including stocks at domestic spinning mills and 20,000 bales of cotton awaiting export.

Despite some substantial purchases during March and early April by China, prices of Pakistani cotton have declined steadily from the peak reached early in January 1952. For example, saw-ginned cotton 289F Sind, Fine grade, the quality most comparable to American Middling 15/16-inch, decreased from the equivalent of 47.30 U.S. cents a pound on January 2 (excluding the export tax of 13.85 cents a pound) to 34.10 cents on June 4, almost to the level of the government support price of 33.73 cents for that type.

With prices near the floor level and very little trading on the spot market by the latter part of April, members of the trade requested that the government make some provision to implement the purchase of cotton included under the price-support program. Toward the end of April the government listed the firms designated to act as agents in making purchases of cotton at the floor prices. By May 30 it was estimated that slightly more than

200,000 bales of cotton had been tendered the government through these agents. Some confusion prevailed in classifying this large quantity of cotton in such a short time. By early June about 150,000 bales had been approved, aided by a revision in the earlier method of classing each bale tendered to examining only 2 bales out of each lot, which averaged about 80 Pakistani bales (of 400 pounds gross). There was also some uncertainty as to the method by which cotton firms would be paid for the bales accepted by the government, although it was expected this would be cleared up shortly.

U.S. COTTON EXPORTS DOWN

Exports of cotton from the United States in April amounted to 345,000 bales of 500 pounds gross weight (334,000 running bales). This makes a total of 5,064,000 bales (4,891,000 running bales) for August-April 1951-52 compared with 3,551,000 bales (3,403,000 running bales) for a similar period a year ago. The principal destinations in April were Japan, India, Italy, the United Kingdom, and the Netherlands.

There has been some lag in export sales and shipments of United States cotton in the past 2 or 3 months as a result of the world-wide recession in cotton textile trade and the downward trend in cotton prices. Many mills in foreign countries now have stocks sufficient for currently reduced mill operations until new crops become available and are not inclined to end the season with excessive stocks while new-crop prices are substantially lower than spot prices on the old crop.

Foreign cotton of American type appears to be available in quantities sufficient to meet current demand from importers. Prices are still well above those for United States cotton in Brazil and Pakistan where they are supported at a high level by the governments of those countries. Turkish cotton is being quoted currently at prices about equal to those in the United States but in Mexico and Peru, cotton quotations are 5 to 6 cents lower after export taxes in those countries are considered.

Incomplete information on cotton booked for shipment before the end of July and quantities being shipped under the Mutual Security program and Export-Import Bank loans suggest that the 1951-52 total may approximate 5-3/4 million running bales, or a little less than 5.9 million bales of 500 pounds.

(See table on following page)

UNITED STATES: Exports of cotton by countries of destination
 averages 1934-38 and 1945-49; annual 1949-50 and 1950-51
 August-April 1950-51 and 1951-52

(Equivalent bales of 500 pounds gross)

Countries of destination	Year beginning August 1				August-April	
	Averages		1949-50	1950-51	1950-51	1951-52
	1934-38	1945-49				
	1,000	1,000	1,000	1,000	1,000	1,000
	bales	bales	bales	bales	bales	bales
Austria.....	0:1/	36:	61:	55:	35:	23
Belgium-Luxembourg..	147:	131:	192:	80:	68:	311
Czechoslovakia.....	65:	57:	58:	6:	6:	0
Denmark.....	35:	14:	34:	31:	23:	31
Finland.....	35:	21:	3:	3:	2:	32
France.....	589:	575:	794:	447:	344:	283
Germany.....	579:	340:	759:	481:	423:	377
Greece.....	2:	21:	50:	1:	1:	0
Italy.....	430:	489:	749:	546:	358:	397
Netherlands.....	86:	131:	259:	158:	127:	171
Norway.....	13:	7:	8:	20:	17:	15
Poland and Danzig....	224:	69:	47:	1:	1:	0
Spain.....	101:	69:	66:	66:	50:	179
Sweden.....	93:	12:	29:	33:	31:	98
Switzerland.....	2:	26:	41:	22:	22:	99
United Kingdom.....	1,097:	488:	607:	307:	281:	662
Yugoslavia.....	10:	47:	26:	78:	46:	90
Other Europe.....	2/ 85:	12:3/	38:	12:	7:	26
Total.....	3,593:	2,545:	3,821:	2,347:	1,842:	2,794
Canada.....	261:	275:	286:	431:	345:	264
Chile.....	4/ :	20:	39:	48:	37:	35
Colombia.....	17:	24:	63:	55:	48:	47
Cuba.....	7:	16:	19:	24:	21:	19
India.....	44:	86:	405:	219:	190:	749
China.....	55:	401:	132:	54:	54:	0
Japan.....	1,271:	585:	929:	883:	848:	922
French India and	:	:	:	:	:	:
Indochina.....	4/ :	6:	11:	16:	12:	16
Korea, Republic of...	4/ : 5/	48:	52:	36:	21:	40
Australia.....	5:	7:	0:	0:	0:	49
Other countries.....	43:	52: 6/	247:	167:	133:	129
Total.....	5,296:	4,065:	6,004:	4,280:	3,551:	5,064

1/ Four-year average. 2/ Includes 39 Portugal, 23 Soviet Union. 3/ Includes 24 Hungary, 5 Rumania. 4/ If any, included in Other Countries. 5/ Three-year average. 6/ Includes 144 Hong Kong, 41 Manchuria.

Compiled from official records of the Bureau of the Census.

LIVESTOCK AND ANIMAL PRODUCTSCURRENT DEVELOPMENTS IN THE
CANADIAN LIVESTOCK INDUSTRY 1/

The Canadian Government has granted a two-month extension of the current beef support price program and indicated that Canada's meat shipments to England may be double the 40 million pounds originally estimated, reports W. L. Rodman of the American Embassy at Ottawa.

As previously reported, the floor price in Canada for beef as announced in April was based on 25 cents a pound for good grade steers at Toronto and Montreal markets. This program was to be reviewed each month and was subject to alteration depending upon existing marketing conditions at the time. The current beef floor price varies regionally. For good steers it is 23.35 cents a pound at Winnipeg, 22.8 cents at Vancouver and 25 cents at Moncton. In some cases, particularly in Saskatchewan, packers have been paying less than the floor price. To correct this, the Government is making arrangements with the livestock branch of the Saskatchewan Wheat Pool to hold cattle auctions. The Federal Government will purchase all cattle not otherwise sold and turn them on government-owned community pastures for resale or slaughter at a later date. It is estimated that these pastures will accommodate up to 20 thousand head.

Manitoba has agreed to lift its embargo on western cattle as of June 7. The Federal Government has refused to support Manitoba beef until these restrictions are removed. With the lifting of this major obstruction to livestock marketing, Manitoba beef becomes eligible for the support program and thus may be included in meat shipments to the United Kingdom.

Under the recently announced tripartite agreement, Canadian meat shipments to Britain will equal New Zealand meat exports diverted from the United Kingdom to the United States. New Zealand has now indicated that it will have nearly 80 million pounds of beef available for the United States market. This amount, which is roughly the equivalent of 160 thousand head of cattle, is double the original estimate and equal to the Canadian beef surplus for this year. To date, only 700 thousand pounds of frozen beef quarters have been sent to England from Canada under the agreement. However, Federal beef purchases for this purpose now exceed 16 million pounds and should total 22 million pounds by June 7.

Favorable grass conditions throughout Canada are inducing farmers to withhold cattle from markets. The inspected slaughter of cattle for this year to May 24 is set at 407,517 head, an 8 percent decrease over the same period in 1951. The heavy spring cattle marketing run appears to be over. However, the Government does not expect any difficulty in procuring sufficient numbers to meet export needs.

1/ A detailed report Canadian Livestock and Meat Situation, dated June 9, 1952, is available from the Office of Foreign Agricultural Relations, U. S. Department of Agriculture, Washington 25, D. C.

UNION OF SOUTH AFRICA MEAT SUPPLIES AFFECTED BY DROUGHT

The severe summer drought which started in late October 1951 and lasted until the end of February 1952 has been described as the worst since 1932-33. It has had significant and far reaching effects on the South African food situation, report C. H. Marks and J. L. Dougherty of the American Embassy in Pretoria.

The poor pasture conditions and short corn crop in 1951-52 forced livestock producers to market more slaughter stock than normally, even though the animals were in poor condition. Consequently, adequate supplies of fresh beef in particular have been available and large stocks in cold storage have insured good supplies during the first half of 1952. The winter season (beginning in July) is expected to show a deteriorating situation with stocks of meat reaching a critical state. The remaining half of 1952 may witness a more serious Union-wide meat shortage than during 1951. The steady decrease in cattle numbers since 1948 indicates a continuing over-all decrease in beef supplies during the next few years.

FATS AND OILS

PEANUT IMPORTS INTO WESTERN EUROPE DECLINE IN 1951

Imports of peanuts (shelled and unshelled) into Western Europe in 1951 amounted to 578,100 metric tons or some 200,000 tons less than the 1950 tonnage of 783,850. The decline is explained by the sharp decreases in shipments from British Africa, India, and the United States. On the other hand, imports from China doubled and receipts from French Africa increased some 13,000 tons.

British Africa and French Africa were the origin of 74 percent of the 1950 imports into Western Europe and 70 percent of the 1951 tonnage. The bulk of these shipments went to the mother countries, the United Kingdom and France, respectively. In addition sizeable quantities of peanuts from Portuguese African Colonies went to Portugal.

Peanut imports from India declined from 57,587 tons in 1950 to 18,533 tons last year. Western Germany and the Netherlands took the largest share of the 1950 imports while France purchased the only sizeable tonnage in 1951. Imports from the United States dropped from 33,162 tons in 1950 (including ERP shipments of almost 22,000 tons to Austria) to only 4,245 tons in 1951.

China again became an important source of peanuts for European markets in 1950 supplying 34,890 tons, and in 1951 sales jumped to over 70,000 tons. About one-third of the 1950 imports went to Belgium while in 1951 Western Germany was the principal buyer and Switzerland ranked second.

Relatively small quantities of peanuts are re-exported by the importing country to other countries of Western Europe.

PEANUTS: Imports into Western Europe
by country of origin, 1950 and 1951 1/
(Metric tons)

Country	Year	Country of origin						Total
		United States	China	India	French Africa	British Africa 2/	Other	
Austria...	1950	21,984	-	-	-	-	-	21,984
	1951	-	-	2,971	-	-	-	2,971
Belgium.....	1950A	19	12,946	558	-	1,665	2,871	18,059
	1951A	1,232	10,633	1,413	-	390	2,196	15,864
Denmark.....	1950A	0	0	5,400	-	-	4,000	9,400
	1951	-	-	203	-	-	-	203
France.....	1950	35	7,658	3,327	194,107	-	6,045	211,172
	1951	0	4,639	8,249	207,365	-	12,815	233,068
Western Germany.	1950A	-	5,503	7,259	42	270	2,987	16,061
	B	-	419	14,714	67	-	8,192	23,392
	1951A	988	21,153	926	-	-	2,735	25,802
	B	-	6,049	6	9	657	3,442	10,163
Italy.....	1950A	11,109	379	-	-	-	957	12,445
	B	-	-	-	-	-	-	268
	1951A	-	400	2,141	-	-	15	2,556
	B	-	103	-	-	-	423	526
Netherlands.....	1950A	-	738	20,887	17	-	3/ 8,800	30,442
	B	15	4,259	-	-	106	3/ 11,374	15,754
	1951A	-	1,069	258	-	-	3/ 3,826	5,153
	B	-	2,529	25	-	251	3/ 3,790	6,595
Norway.....	1950	-	2,988	934	2,546	-	1,977	8,445
	1951	2,025	1,727	2,089	2,455	3,547	1,556	13,399
Portugal.....	1950	-	-	-	-	-	4/	29,873
	1951	-	-	-	-	-	5/	22,890
Sweden.....	1950	-	-	-	-	-	-	205
	1951	-	-	-	-	-	-	735
Switzerland.....	1950	-	-	-	-	-	-	6/
	1951	-	7/ 22,260	-	-	-	8/ 18,220	40,480
United Kingdom..	1950A	-	-	4,508	-	9/ 317,194	10/ 1,878	323,580
	B	-	-	-	-	62,684	10/ 86	62,770
	1951A	-	-	252	-	9/ 134,098	11/ 2,948	137,298
	B	-	-	-	-	58,053	2,350	60,403
Total.....	1950	33,162	34,890	57,587	196,779	381,919	49,167	783,850
	1951	4,245	70,562	18,533	209,829	196,996	54,316	578,106

A. Shelled. B. Unshelled

1/ Preliminary. 2/ Including Anglo-Egyptian Sudan and the Union of South Africa.

3/ Principally from Indonesia. 4/ All from Portuguese possessions.

5/ Principally Portuguese Africa. 6/ Not separately classified.

7/ Approximation. 8/ Principally India and the United States. Breakdown not reported.

9/ Nigeria. 10/ Other British countries. 11/ Of which 2,926 originated in other British countries.

Compiled from official sources.

United States Department of Agriculture, Office of Foreign Agricultural Relations, Fats and Oils Division.

PEANUT OIL IMPORTS INTO
WESTERN EUROPE UP IN 1951

Peanut oil imports into Western Europe increased about 40 percent last year--from 109,785 metric tons in 1950 to 156,758 tons in 1951. While oil purchases from China and India were up sharply, the quantities supplied by French Africa and the United States decreased substantially.

PEANUT OIL: Imports into Western Europe
by country of origin, 1950 and 1951 1/
(Metric tons)

Country	Year	Country of origin						Other	Total
		United States	China	India	French Africa	British Africa	2/		
Austria.....	1950	-	-	-	-	-	-	-	3/
	1951	-	-	317	-	-	-	1,184	1,501
Belgium.....	1950	8,900	7,178	1,710	-	199	4/	3,731	21,718
	1951	8,900	11,697	5,279	-	349	-	1,808	28,033
Denmark.....	1950	-	-	0	-	-	-	110	110
	1951	-	-	-	-	-	-	-	2,166
France.....	1950	-	-	13,435	599	-	-	433	44,045
	1951	3,822	1,765	16,860	37,890	341	5/	13,674	74,352
Western Germany....	1950	-	762	1,342	2,258	178	6/	10,178	14,718
	1951	1,149	75	5,792	-	217	-	1,180	8,413
Italy.....	1950	1,438	-	268	-	-	-	2,663	4,369
	1951	-	-	10,318	-	-	-	1,339	11,657
Netherlands.....	1950	3,570	699	691	-	430	-	638	6,028
	1951	1,432	119	2,812	-	1,069	-	1,799	7,231
Portugal.....	1950	-	-	-	-	-	-	-	50
	1951	-	-	-	-	-	-	-	731
Sweden.....	1950	-	-	-	-	-	-	-	594
	1951	-	-	-	-	-	-	-	3/
Switzerland.....	1950	4,992	-	-	-	-	-	6,003	10,995
	1951	-	-	-	-	-	-	-	6,181
United Kingdom.....	1950	-	-	-	-	-	-	-	7,158
	1951	-	-	-	-	-	-	-	16,493
Total.....	1950	18,900	8,639	4,024	45,857	807	-	23,756	109,785
	1951	15,303	13,656	41,378	37,890	1,976	-	20,984	156,758

1/ Preliminary.

2/ Including Anglo Egyptian Sudan and the Union of South Africa.

3/ Not separately classified.

4/ Principally from the Belgian Congo.

5/ 5,040 tons from the Belgian Congo.

6/ 9,430 tons from the Netherlands.

Compiled from official sources.

United States Department of Agriculture, Office of Foreign Agricultural Relations,
Fats and Oils Division.

Oil from French Africa, the source of about one-half of the 1950 imports and about one-fourth of the 1951 tonnage, went almost entirely to France. India, which sold only a negligible quantity of peanut oil to Western Europe in 1950, became the principal supplier in 1951 with 41,378 tons (declared imports from this source). France and Italy purchased the largest tonnages. Oil specified as originating in China increased from 8,639 tons in 1950 to 13,656 tons last year with Belgium taking the bulk of the total. And, while Western Europe received 18,900 tons of peanut oil from the United States in 1950, purchases dropped to 15,303 in 1951. Roughly one-half of the oil was taken by Belgium.

A comparatively small volume of imported peanut oil or oil obtained from imported peanuts is traded within Western Europe. The total quantity cannot be determined readily as this oil is combined with other edible oils in the trade statistics of a number of European countries. However, for the year 1950, some 17,000 tons can be identified as peanut oil traded within the area--11,318 tons from the Netherlands, 3,888 from Belgium, 1,177 from France and less than 1,000 tons each from other countries. Again in 1951, the movement of peanut oil between Western European countries reached at least 23,580 tons. Belgium exported 16,029 tons, Western Germany 5,100 and the Netherlands 2,318 tons.

AUSTRALIAN OILSEED PRODUCTION DOWN IN 1951-52

Production of major vegetable oilseeds in Australia during 1951-52 is expected to total about 16,400 short tons, or almost 9 percent less than the 17,940-ton output in 1950-51, reports T. C. M. Robinson, Agricultural Attache, American Embassy, Sydney. The principal reason for the decrease in output is the near failure of the sunflower seed crop with only 221 tons against more than 2,000 tons in 1950-51. The sharp drop was due to dry weather and to the greater profitability of competitive crops. Flaxseed production (346,750 bushels) increased by 5 percent, peanut output (5,806 tons) dropped off about 4 percent, and cottonseed production (671 tons) promises to be 7 percent larger than the previous year. The total area planted to these crops in 1951-52 was 83,250 acres, 10 percent larger than in the preceding year.

Of the minor oil crops grown in Australia, olive production is currently the most important with about 450 tons being produced in 1951-52. Soybean production amounted to only 200 bushels, all in Queensland, while tung nut output was estimated at 2.5 tons. A new Australian industry was founded in November 1951 when a South Australian company started to crush grape seeds for their oil. It is forecast that about 45 tons of grapeseed oil will be produced in 1951-52, but in succeeding years production is expected to be about 4 times this quantity.

Flaxseed, copra, and peanuts are the only oil bearing materials imported into Australia of any significance. Imports of these commodities in 1950-51 with 1949-50 imports in parentheses, were as follows: Flaxseed-15,374 tons (21,763); peanuts-1,666 (303); and copra-23,719 (32,627). All of the flaxseed, and practically all of the peanuts originated in India and China, respectively, while most of the copra came from New Guinea and Papua.

Production of linseed oil from imported and domestic seed is forecast at 16,210 tons, or about the same as in the preceding year. Although the production of coconut oil is not available, production of margarine, which is dependent on this oil, totalled 29,300 tons in calendar year 1951. The latest information in regard to crushings of other oilseeds in Australia is for 1948-49 when 1,334 tons of peanut oil, 135 tons of sunflower seed oil, and 120 tons of olive oil were produced.

Data in regard to vegetable oil imports for the first 8 months of 1951-52 (July-February) are available only for linseed oil and were 18,840 tons; almost double the quantity imported in the preceding year, and 16 percent greater than the total importation of vegetable oils in 1950-51. Total imports of vegetable oils in 1950-51 amounted to 16,219 tons and were as follows: linseed oil-9,479 tons; castor oil-3,497; tung oil-1,509; olive oil-1,118; peanut oil-322; rapeseed oil-282; and cottonseed oil-12 tons. India was the principal supplier of linseed oil, although Belgium, Uruguay and Argentina also supplied large quantities. Over 96 percent of the castor oil came from India, while China was the principal source for rapeseed, tung, and peanut oils. Olive oil imports originated from various Mediterranean producing countries.

Only linseed and castor oil with 80 and 123 tons, respectively, were exported from Australia in sizable quantities in 1950-51.

Flaxseed prices received this season range from a high of £90 per long ton (\$5.06 per bushel) for pure seed of 40 percent oil content free on rail in Brisbane and Adelaide to an expected low of about £83 (\$4.67) paid to farmers in Victoria. Queensland growers of sunflower seed are receiving up to £85 (\$170 per short ton) while prices received during the past year for 1950-51 cottonseed averaged about £16 (\$32). The Queensland Department of Agriculture and Stocks estimates that peanuts from the 1951-52 crop will bring an average of 1 shilling 3 pence (14.1 cents) per pound.

PHILIPPINE COPRA EXPORTS DOWN IN MAY

Philippine copra exports during May of 42,824 long tons represented the smallest monthly shipment to date during 1952. The following consignments were made: United States-22,899 tons (Pacific 15,775, Atlantic 5,824; and Gulf 1,300); Canada-1,500; Venezuela-8,250; Belgium-3,800; Denmark-1,200; Netherlands-2,300; Japan-1,575; Israel-400; Syria-400; and Iraq-500 tons. January-May exports totaled 249,434 tons against 295,075 tons during the comparable period of 1951.

Coconut oil shipments of 7,736 tons went to the United States-6,566 tons (Atlantic 6,114 and Gulf 452); Netherlands-587; and South Africa-583. The January-May total reached 34,230 tons compared with 27,967 during the first 5 months of 1951.

The copra export price in mid-June was \$145 c.i.f. Pacific (nominal price). Local buying prices in Manila ranged from 23.50 to 24.50 pesos per 100 kilograms (\$119.39-\$124.47 per long ton) and in producing areas from 22.00 to 24.00 pesos (\$111.77-\$121.93).

HAITI'S CASTOR BEAN EXPORTS INCREASE

Exports of castor beans from Haiti in 1950-51, all to the United States, totalled 5,136 short tons, an increase of more than 40 percent from the 3,637-ton export in the preceding fiscal year, reports R. P. Stovall, American Embassy, Port-au-Prince. In the last quarter of 1951, some 510 tons of castor beans also were exported to the United States, with the exception of about 1 ton to Venezuela. Other oilseed products exported from Haiti in 1950-51 included 2,059 tons of cottonseed cake, mainly to Belgium, 14 tons of peanuts, and 14 tons of coconut oil.

Although Haiti is an importer of vegetable oils and animal fats, there is some local production. Output of refined vegetable oils from domestic raw materials in 1951 consisted of 665 tons of cottonseed oil and 75 tons of coconut oil. Practically all of the local production of castor beans is exported as such. An additional production of 970 tons of refined vegetable oils reflected the relatively large quantity of crude oil imported, mainly cottonseed but including some soybean oil, which was further processed by the local factories. As by-products of the oil manufacture, Haiti produced some 2,330 tons of cottonseed cake and 453,325 pounds of crude soap.

Imports of fats, oils and oilseeds into Haiti in 1950-51 included 198 tons of butter and butter substitutes, 608 tons of edible oils, 2,345 tons of lard and lard substitutes, 1,188 tons of crude vegetable oils, 772 tons of cottonseed, and 6,634 tons of common soap. The United States, as in the preceding year, was the principal supplier.

The recent low price of imported lard and the heavy imports of this product brought about a reduction in the price of locally produced oil. The April price for cottonseed was \$9 per 5 gallon can (37 pounds), while the March price for soybean oil was \$10. The local mills plan to continue importing unrefined oil for further processing to supplement production from local raw materials. In spite of the tax of \$12.50 per metric ton on the exportation of cottonseed cake, most of the locally produced cake continues to be exported.

TOBACCO

URUGUAY'S TOBACCO PRODUCTION, IMPORTS CIGARETTE PRODUCTION AND CONSUMPTION HIGHER

Uruguay's 1951-52 leaf production is estimated at 12 percent above the 1950-51 outturn, according to R. Carrier, American Embassy, Montevideo. Imports of unmanufactured tobacco during 1951 were 10 percent above the 1950 total. Cigarette production for 1951 is estimated at 9 percent above 1950. The 1951 cigarette consumption is also reported at 9 percent above 1950.

The country's 1951-52 tobacco harvest is estimated at 741,000 pounds from 596 acres. This is comparable to the 1950-51 output of 661,000 pounds from 645 acres. Yield per acre during 1951-52 is estimated at 1,244 pounds as compared with only 1,025 pounds per acre in 1950-51.

During the 1951 calendar year, Uruguay imported 10.2 million pounds of unmanufactured tobacco as compared with 9.3 million in 1950. Brazil continued to be the most important source of unmanufactured tobacco during 1951, supplying 5.2 million pounds; the United States ranked second, with 2.9 million pounds; Cuba, third, with 1.0 million, and the Dominican Republic, fourth, with 0.5 million pounds. The remaining 0.6 million pounds was supplied in varying quantities by Italy, Turkey, South Africa, Paraguay and "other" foreign countries.

Cigarette production in Uruguay reached a record level during 1951, totaling 1,582 million pieces as compared with 1,450 million pieces in 1950. Production of cigars and smoking tobacco decreased slightly during 1951 as compared with 1950.

Consumption of cigarettes during 1951 is estimated at 1,640 million pieces as compared with 1,506 million in 1950. Estimated consumption of all manufactured tobacco products, including cigarettes, during 1951 was 9.0 million pounds as compared with 8.9 million pounds in 1950.

PARAGUAY'S TOBACCO PRODUCTION AND EXPORTS LOWER

Paraguay's 1951-52 tobacco harvest is estimated at 20 percent below 1950-51, according to L. J. Ryan, American Embassy, Asuncion. Exports of unmanufactured tobacco during the 1951 calendar year was 22 percent below 1950.

The country's 1951-52 leaf harvest is estimated at 8.8 million pounds. This corresponds to 11.0 million pounds in 1950-51 and 9.9 million pounds in 1949-50. Lower production for 1951-52 is primarily attributable to decreased acreage planted to tobacco and also drought conditions during this growing season.

Exports of unmanufactured tobacco during 1951 totaled only 5.9 million pounds as compared with 7.6 million pounds in 1950 and 14.6 million pounds in 1949. The Netherlands, the most important source of unmanufactured tobacco in 1951, supplied 1.1 million pounds; Argentina ranked second, with 1.0 million pounds; Uruguay, third, with 0.9 million; Belgium, fourth, with 0.8 million. The other 2.1 million pounds were supplied by Argentina, France and "other" foreign countries. Imports into Paraguay are relatively unimportant. However, during 1951 a total of 104,719 pounds were imported, 84 percent of which was supplied by Uruguay.

GRAINS, GRAIN PRODUCTS AND FEEDS

JAPAN'S GRAIN OUTLOOK GOOD

The condition of grain crops in Japan on June 1 was reported by the Ministry of Agriculture as generally good to excellent. Marked improvement in the principal grains was reported, as a result of favorable weather throughout May. With the improved prospects, the total outturn of wheat, barley, and naked barley is estimated to be about 5 percent higher than the May 1 forecast, and is only about 4 percent below the record production of 1951.

The June 1 forecast for wheat is 53 million bushels, compared with about 55 million last year and the prewar average (1935-39) of 50 million bushels. A crop of the size forecast would indicate yields only fractionally below the record yields of a year ago with acreage slightly below the 1951 area. It is noted that the June rainy season has been delayed, and the relatively light rains during the first half further improved the grain prospects. The harvesting of grain was more than half completed as of June 15, and there is some expectation that the next estimate may be higher, reflecting the favorable conditions.

The barley forecast is the equivalent of 46 million bushels and naked barley, 39 million. Thus the total barley crop of about 85 million bushels in prospect is somewhat below the 1951 harvest of 100 million bushels. This would be however, somewhat above the prewar average of 73 million bushels. On the basis of present estimates for acreage and the production forecasts, the 1951 yields would be about 10 percent below average yields in 1951.

TUNISIA BUILDING NEW GRAIN STORAGE PLANT

Construction work has begun on a grain storage plant in an industrial suburb of Tunis. The new storage silo, claimed to be the largest in North Africa is to have a capacity of 550,000 metric quintals, the equivalent of about 20 million bushels of wheat. The present grain storage capacity of the country is reported at 1.3 million quintals, thus the new construction will increase the country's total by about 40 percent.

The installations will include loading and unloading equipment capable of accommodating trucks and railway cars of both narrow and standard gauge systems. The construction costs are to be provided by advances from the Tunisian section of the French Grain Office, the French Monnet Plan, and by the silo owners, the Cooperative Centrale des Agriculteurs.

TURKEY EXPECTS BUMPER SMALLGRAIN HARVEST

The outlook for the 1952 crop of small grains in Turkey is favorable, and yields equal to or even slightly in excess of the record 1951 yields are expected. The outlook is now more promising than earlier season prospects indicated, since widespread rains received through out the country during mid-May relieved dry conditions in Thrace, Aegean, and parts of Anatolia. Cool weather following the rainfall was also beneficial.

For the Central Plateau, additional rains will be needed in late June to promote proper filling. Grain in the Mediterranean area was ripening and barley harvest was already underway early in June. No serious rust infestation had been reported from harvested areas. Though official estimates of grain acreage are not yet available, total grain acreage is expected to be moderately larger than in 1951 though not up to the official goal.

If current forecasts are realized, about 1.2 million metric tons of grain may be available for export from that crop. In view of the prospective large harvest the government's purchase agency expects that its 1952-53 grain purchases may reach about 1.8 million metric tons. Supplying satisfactory storage for such large volume of grain confronts the government with an increasingly urgent problem. In order to move the volume of grain promptly and without excessive waste, increased facilities need to be established at country concentration centers and at export points. Present storage facilities consisting of various elevators, silos, warehouses and sheds have a total capacity of about 430,000 metric tons. During the 1951-52 season about 220,000 tons of grain were stored in the open under canvas, 150,000 tons in open storage covered with soil, and 300,000 tons in rented warehouses and other buildings.

As the bulk of the crop is handled by hand labor both in the country and at the ports, much bagging and re-bagging of the grain is required, making handling slow, expensive and wasteful. Cleaning equipment is at present not available. Plans for purchase of substantial temporary storage facilities are announced. Also grain cleaning and handling equipment is to be installed to facilitate export movement and improve the quality of the grain available for export.